Minutes of the
College and University Student Aid Directors (CUSAD) meeting
August 5, 2003

CUSAD Members:  Lynn Aaberg, WSC; Diane Christenson, MiSU-BC; Dale Gehring, MiSU; Shirley Hanson, MaSU; Robin Holden, UND; Jeff Jacobs, BSC; Sandy Klein, DSU; James Kennedy, NDSU; Katie Nettell, LRSC; Betty Schumacher, VCSU; Jeanne Enebo, NDSU; Cheryl Wescott, Vocational Rehabilitation; Scott Mahar, HECN; Julie Kubisiak, BND; Pat Seaworth, Sheila Tibke, and Peggy Wipf, NDUS

Chairperson Aaberg called the meeting to order and thanked everyone for coming.

ND Vocational Rehabilitation (Voc Rehab)
Cheryl Wescott from ND the Vocational Rehabilitation office shared with the group their November 1, 2002, Voc Rehab Policies on Postsecondary Training.  Cheryl stated that individuals with disabilities may apply for Voc Rehab educational funds and that priority funding is given to individuals who have the greatest disability (as determined by Voc Rehab.)  Cheryl indicated that Voc Rehab clients must complete the federal need analysis form (the FAFSA) and must accept all grant assistance from a postsecondary institution before Voc Rehab will review a client’s request for Voc Rehab funding.  Cheryl also indicated that all federal financial aid requirements relative to default on a student loan, ineligibility for financial aid due to a drug conviction, satisfactory progress, etc., must also be met by a client before they are considered for Voc Rehab funding.

Cheryl stated that Voc Rehab receives $10 million a year to assist their clientele and that 55-60 percent of their budget is put into training.

Cheryl requested that Peggy send her the NDUS 2003-04 Institutional Charges Chart (which includes NDUS tuition, fee, room and board charges) to distribute to their Voc Rehab counselors to assist the calculation of a student’s cost of attendance.

HECN People Soft Update
Scott Mahar, HECN North, presented an overview of the Connect ND project.  Scott indicated the project is on target and going well.  He stated that all components of the People Soft software are integrated (including student records and finance) and that the timing of implementing the various functional areas is critical to ensure that implementation goes as scheduled.  Scott indicated that a problem with student record conversions delayed the use of the full financial aid functionality at the pilot campuses.

Scott shared with the group that the schedule to shift the remaining 9 institutions over to People Soft may be delayed slightly and that the remaining campuses would be brought on-board during May, June, and July of 2004.  Scott indicated that ISIR’s load for 2004-05 along with budgeting and awarding may occur on the Legacy system at the remaining 9 institutions and then these institutions would cut-over to People Soft at a later date for disbursement, etc.  Scott shared that 85 percent of People Soft’s modules for financial
aid consists of set-up and the remaining 15 percent involves the actual processing of financial aid.

People Soft training concerns were addressed. Scott stated that:

- Each director should identify who is responsible for what functionality in his or her office, i.e., verification. Once an individual is trained in their respective area, People Soft security clearance will be given to that person to perform their duties.
- Regional training sites are being considered, i.e., Bismarck, Fargo, Minot, Grand Forks. Training could begin as early as March/April 2004.
- Maximus will provide training for People Soft queries.
- Super users from each campus will be trained to write queries.
- Queries will be written to handle survey requests.
- Your computer should have 512 mega ram.
- Personnel in the respective financial aid offices should be trained in Internet Explorer, Excel, and Word.

**Graham-Leach-Bliley Act**
The Graham-Leach-Bliley Act outlines the new consumer information privacy and security requirements that each campus must have in place by May 23, 2003, to help protect against identity theft.

Pat Seaworth handed out an e-mail that highlighted the safeguarding rules of the Act. Pat indicated that Grant Crawford is the designated NDUS Information Security Policy Coordinator for the System. Pat also stated that each campus must have their own coordinator to monitor the requirements of this Act. In addition, Pat handed out a NDUS Procedure, 1912.1 – Information Security Procedures that the Chancellor approved to serve as a road map for campuses as they put into place a plan to comply with this Act.

Suggested outcomes of Pat’s presentation included that:

- Aid offices need to ensure a student/counselor’s conversation is held in confidence and not overheard by another student who may be standing outside an office door. Maybe a window could be put into a solid door of an office to ensure the confidentiality of a conversation.
- Make sure that a student’s ISIR or tax forms are not in eyes-way of another student. Maybe put a tray of student paperwork in a drawer to ensure that another student walking by a counselor desks cannot see another students social security number or financial aid information.

**2004-05 Miscellaneous (personal) Expense & Books and Supplies Cost of Attendance Items**
Robin Holden shared with the group, based on the Consumer Price Index, that the recommended miscellaneous expense line-item within a student’s cost of attendance budget for academic year 2004-05 be $2850. This is a two-percent increase over the 2003-04 figure used ($2800).
It was the consensus of the group that the miscellaneous expense line-item within a student’s cost of attendance budget for academic year 2004-05 be increased to $2850 for all NDUS institutions. It was further stated that the $2850 figure is a suggested target.

Lynn Aaberg recommended that the books and supplies line item within a student’s cost of attendance budget be increased to $750 for 2004-05. This is a $50 increase over the recommended $700 figure used for academic year 2003-04.

It was the consensus of the group that the books and supplies line item within a student’s cost of attendance budget for academic year 2004-05 be increased to $750 for all NDUS institutions. It was further stated that the $750 figure is a suggested target.

**Budgeting**

A brief discussion ensued relative to budgets used for the packaging of financial aid. Jeff Jacobs and James Kennedy suggested that as we move forward with the implementation of People Soft, that financial aid offices consider streamlining the use of numerous cost of attendance budgets and consider using an average approach.

**Lottery Funds**

Robin Holden shared with the group that more than 37 states have approved state lotteries and that many states have set aside dollars from their lotteries to be used for need-based grants and/or scholarships.

It was a consensus recommendation of the group that the Chancellor’s cabinet explore with the Governor and OMB during the building of the 2005-07 biennial budget the use of new lottery dollars to go towards the recruitment and retention of postsecondary students attending North Dakota’s colleges and universities. It was further recommended that these new dollars not supplant current State Grant and/or Scholars dollars but supplement the current funding levels.

**Last Day of Attendance**

A brainstorm discussion occurred as to how NDUS campuses are handling the last day of attendance liability. Many indicated that they have in place an institutional policy to monitor the last day of attendance of a student and that they are making a good-faith effort to comply with current regulations. One campus indicated that they inform students via a mid-term letter if a student has a grade of D or lower.

**Miscellaneous**

CUSAD members indicated that we continue to meet yearly. James Kennedy, NDSU, will be the new chairperson for academic year 2003-04. Please forward future CUSAD agenda items to either James Kennedy or Peggy Wipf.

Prepared by:

Peggy Wipf